

Project Plan Template

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There are multiple sheets within this tool—click through the tabs at the bottom of the spreadsheet. For tips on each section, hover over or click on cells with a small triangle bookmark at the top right.

Project Name: Success Looks Like: [1] **Timeline:**

Manager					Owner					Consulted					Helper					Approver					Stakeholders [2]													
[3]																																						

Stream: Choice Points: [5]

Week 1 [4]	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14
10/21/19	10/28/19	11/4/19	11/11/19	11/18/19	11/25/19	12/2/19	12/9/19	12/16/19	12/23/19	12/30/19	1/6/20	1/13/20	1/20/20

Step [6]	Owner [7]	Stakeholders/ Consulted [8]	Due [9]	Status [10]	[11]
Step 1	Tammy	Judy		Done	1/6
Step 2				Working on i	
Step 3				Stuck	
Step 4				Done	
Step 5					
Step 6					
Step 7					
Step 8					
Step 9					
Step 10					

Stream: Choice Points:

Step	Owner	Stakeholders/ Consulted	Due	Status

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Step	Owner	Stakeholders/ Consulted	Due	Status

Project Plan Sample

For tips on each section, hover over or click on cells with a small triangle bookmark at the top right.

Project Name: Panel on Climate Change Initiative **Timeline: 10/22-1/15. Panel is 1/15.**

Success Looks Like: At least 80 participants attend the event, of which 75% share they are satisfied with the event and feel equipped to take action on the upcoming climate bills. People of Color and/or Indigenous (POCI) are at least as satisfied + strongly agree as non-POCI. [12]

Manager	Owner	Consulted	Helper	Approver
Dan [14]	Sue	Vijay Retta	Tina (RSVPs) John (Panel) Rachel (Comms)	Carlos

Stakeholders [13]
<input type="checkbox"/> Inez (Board Chair) <input type="checkbox"/> Berniece (lead volunteer) <input type="checkbox"/> Zeln (logistics director) <input type="checkbox"/> Vijay (assistant to keynote speaker) <input type="checkbox"/> Retta (local activist)

Stream: Panel Discussion

Choice Points: Make sure speakers are representative of communities impacted; clearly share our equity and inclusion values with speakers; get input from Berniece and Retta on speaker selection. [16]

Step [17]	Owner [18]	Stakeholders/ Consulted [19]	Due [20]	Status [21]	Week 1 [15]	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14
					10/21/19	10/28/19	11/4/19	11/11/19	11/18/19	11/25/19	12/2/19	12/9/19	12/16/19	12/23/19	12/30/19	1/6/20	1/13/20	1/20/20
Draft outline of topics we want covered in discussion	John		10/28	Done						Holiday W				Holiday W	Holiday W			
Identify potential speakers to join the panel	John		10/30	Done														
	Carlos	Carlos reaches out to Vijay to pitch keynote speaker	11/3	Done														
Draft email invite for speakers	John		11/7	Done														
Carlos signs-off and sends email	John		11/17	Done														
Confirm speakers (internal deadline) and arrange call with speakers	John		11/20	Working on i														
Send speakers email: info on panelists, our publications, outline for discussion	John		12/8	Working on i														
Call with speakers - Dan, Carlos, John, Tina - Dec. 11, sm conf. room	John		12/15	Stuck														
Revise and send out final outline for discussion - Potential Risks: Approval process takes longer than expected - Mitigation: Agree on coding system for emails to quickly differentiate between FYIs, urgent requests, and "when you get a chance" input	John		12/18															
Confirm speakers' attendance; special requests if needed (must-have/external deadline)	John		1/15															
Host event!	John		1/20															
Host a project debrief meeting with all involved and document learnings	John																	

Stream: Invitation

Choice Points: PTR flag! Don't rely on last year's invite list. CP: share venue accessibility and scholarship information in invite.

Step	Owner	Stakeholders/ Consulted	Due	Status
Brainstorm session with team re: how to get the word out	Rachel	Retta: talk about advertising and local scholarships	11/10	Done
Draft invite	Rachel		11/19	Working on i
Get comments from Dan on invite	Rachel		11/28	Stuck
Revise invite based on Dan input	Rachel		12/7	
Finalize and send out	Rachel		12/9	
Track Responses	Tina		Throughou	
Email reminder to RSVPs	Tina		1/6	

Stream: Materials

Choice Points: Ask for stakeholder input on program draft; review all materials for uninclusive language.

Step	Owner	Stakeholders/ Consulted	Due	Status
Draft program and inserts	Sue	Vijay: recommends looking at 18 program	11/20	Working on i
Send materials to Dan	Sue		11/20	Working on i
Revise materials based on Dan input	Sue		12/12	
Finalize and make copies	Tina	Use heavy paper	12/17	

[1] Start by communicating what success looks like at the end of the project.

Tips:

- A good success statement has quantity (e.g. specific numbers) and defines measures that are more qualitative.
- Make the implicit explicit.
- Consider choice points.
- This statement is what you will use to evaluate your program's success. Does it make sense to measure these things?

[2] Stakeholders could be the people most affected by the project, or people who will determine the success/failure of the project. Have them front, center, and visible. Throughout the process of the project, make sure you check in with these people.

Refer to this list at the end of the project (for scheduling debriefs, sharing gratitude, or making acknowledgements).

[3] Make the MOCHA visible. Share this spreadsheet with everyone in your MOCHA.

Test your MOCHA by asking:

- Is everyone aware of (and has consented to) their role in the MOCHA?
- After you build the work plan: Does your MOCHA account for most people who will be involved in the project? Are there any invisible helpers or shadow approvers? (The goal is clarity, not 100% comprehensiveness.)

[4] Based on the Gantt chart, this section lets you know at a glance how much time you have (whether it's in days or weeks). The colored blocks indicate the time allocated for a person to do the step.

Tips:

- Revisit as you go! As the work progresses, things will naturally shift. This lets you keep track of where you are (and where you might need more time).
- Pay attention to how many blocks each person has per week.

[5] Be proactive and identify opportunities to embed and promote racial equity and inclusion throughout your project.

[6] Steps are the specific actions that make up the stream. Get specific and include buffers and mini mitigation plans.

Tips:

- Note differences between internal and must-achieve by/external deadlines.
- Include getting input from stakeholders.
- Your steps might have dependencies (a specific sequence in which they have to happen), so try to write them in chronological order.
- If you anticipate risks, name them.

[7] The person responsible for the success or failure of the step/task.

[8] The person/people being reached out to for input, buy-in, or (sometimes) approval.

[9] Start at the end (when you know the project needs to be done by), then work backwards.

[10] Review this column at project update meetings. The "stuck" option is for flagging a need for help from someone else. Spend less time at meetings on updates and more time on mitigating roadblocks.

[11] Use this row for important dates that may impact people's availability or capacity.

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